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ABSTRACT

This paper examines the viability of the case method as a teaching and learning strategy in instructional systems geared toward the training of personnel for the administration of various aspects of educational systems. The core argument in the presentation is that the case method (introducing problematic real world cases for mutual examination and resolution by teachers and students) provides the trainer with a real opportunity to help the learner become self-directed during the instructional process. The curricular goal of turning theory into practice is also achieved. The paper defines the case method, lists the necessary features of a case, reviews the history of the use of the method, discusses the curricular justification for using the method in the context of educational administration, notes the method's values for the learner, considers some practical concerns from the teacher's perspective, and offers some instructional hints and examples of practice. The paper concludes that while using the method requires training, skill, and preparation by both teachers and students, it can prove very valuable under the right conditions. Appendixes compare conceptions of the curriculum, list key issues in organizational behavior in educational settings, and present a case cited as an example in the text. (PGD)

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THE CASE METHOD: AN APPROACH TO TEACHING

AND

LEARNING IN EDUCATIONAL ADMINISTRATION

by

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EA 018 979

Introduction

One of the critical issues in the professional preparation and development of educational administrators is that of devising instructional strategies and techniques for integrating theory and research as the basis of informing situationally relevant practice in the area of educational administration.

This paper examines the viability of the case method as a teaching/learning strategy in instructional systems geared toward the training of personnel who administer the various areas of the education system. The core argument in this presentation is that the case method provides the curriculum developer and/or trainer with a real opportunity to help the learner to become self-directed during the instructional process. More importantly, the curriculum goal of educational praxis, that is, "theory into practice" can be easily realized through the use of this method. The following limerick highlights these essential purposes of the case study.

A student of administration with tact
Absorbed many answers he lacked
But acquiring a job,
He said with a sob,
"How does one fit answer to fact."

(adapted from Gragg 1954, p. 11)

Defining the Case Method

The case method can be operationally defined as a particular type of teaching strategy which usually gives rise to a variety of participatory learning activities during the instructional process. An essential element of this methodological approach to teaching and learning is the use of a case. Lawrence (1953, p. 215) defines a case as a vehicle by which an empirically derived record of some aspect of organizational reality is brought into the classroom or training laboratory. This reality is usually an account of an actual administrative situation which is problematic in nature and therefore requires for its resolution the application of the skills of managerial/administrative decision-making. When using this method, both instructors and learners need to accept the joint responsibility for providing an indepth analysis and explanation of the major issues imbedded in the case. Following upon this, the key task is to make situationally relevant decisions on the course of action to be taken with a view of problem solving.

Characteristic Features of a Case

As a description of some organizational happening, a case may have two major types of information. These consist of data on the core and related problems, as well as contextual information. The latter includes:

a. pertinent aspects of the history of the organization;

b. intra- and extra-organizational forces affecting the organization;

c. current operational data;

d. biographical data on the key actors in the situation over time;

e. structural features of the organization including insights on the design and control systems; and

f. any other type of information which would clearly throw light on the problematic situation under review.

The core and/or related problems focus specifically on some structural or behavioural problem which the administrator is expected to resolve. It is usually pertinent to the ongoing tasks of integrating the managerial functions which include planning, organizing, staffing, budgeting, coordination and control. These processes are geared toward effective task/performance management while at the same time satisfying the needs of organizational members; and these efforts at goal attainment often happen in situations of contingencies. The issues for case analysis in the area of organizational behaviour centre, therefore, on concerns related to organizational goal setting and design; leadership; interpersonal/group conflict; motivation and organizational development and change.

There are several other salient features of the case. For example, it must be a reliably documented account of a real situation that occurred within the organizational setting. Doriswami and Towl (1963, p. 293) in emphasising the need for empiricism as a feature of authentic case writing noted that:

> **It is useful to think of a case as a connecting link which draws together the experience of the executive (administrator) on the job, the executives (and potential executives) in management development programmes, and the researcher in his (or her) efforts to understand the process of management. The written cases are catalysts to speed the process of learning from experience.**

This striving for authenticity in case writing can facilitate the process by which curriculum developers and course instructors in the various pre- and in-service training programmes in educational administration are able to pursue

the desired path of teaching and learning, using the pedagogical approach of reflection, relevant theorizing and appropriate action. The report on administrative practice as conveyed through the various cases can be evaluated in a clinical way through the use of "disciplined knowledge" from the field of academia. The use of "non-disciplined knowledge" or practical experience gained from day-to-day organizational life is also very desirable. The notion of "educational praxis" is central to the case method.

Another characteristic feature of the case is the systematic efforts at withholding (whenever necessary) the identity of both the organization under review as well as the key actors in the situation. The use of disguise by the case writer is intended to increase the level of confidentiality in reporting on the part of the respondent. As a consequence, the objectivity and therefore reliability of the finding may be better ensured. (Erskine, Leenders, Mauffette-Leenders 1981, pp 10-26).

Why Use the Case Method: A Historical Review

Traditionally, the case method has been popularly used in the preparation of professionals in the field of law and medicine. From the start of this century, it was introduced into the pre-service business management university programmes in the United States of America. For example, Leenders et al (1981, p. 13) recall that the Harvard Business School soon became well known for its innovative role in this effort at curriculum renewal, particularly in the area of teaching methodology.

In 1910, the Dean of Harvard Business School advised faculty members to encourage student discussion on the experiences of practicing business executives and administrators who had been invited into the undergraduate and postgraudate classrooms. By the 1920s, most faculty members had come to accept that the case method could be incorporated as a valuable teaching tool, supplementing the lecture method. At the same time there were members who felt that the case method should in fact take the place of systematic lecturing. Schoen and Sprague (1954, p. 76) escalated the debate on the utility of both methods. Their preference for the case method was obvious:

> **Instead of textbooks, the case method uses descriptions of specific business situations. Instead of giving lectures, the teacher under the case method leads a discussion of these business situations.**

In 1979, several decades since the incorporation of the method in the Business Administration Programmes at Harvard, its use is still keenly supported. For example, in the article Harvard Business School Restudies Itself written by Kiechel (1979), a highly esteemed professor reiterated the view that theory and research data must not merely be elucidated; they must be received. Students must be nurtured to develop a need and desire to use academically derived knowledge for understanding explaining and predicting human behaviour in large scale complex organizational environments.

The Use of the Case Method in Educational Administration Programmes: Any Curricular Justification?

Any discussion on the validity of the case method as an instructional tool ought to take into consideration those curricular issues which pertain to the following:

a. the target group receiving instruction;
b. the curriculum philosophy;
c. curriculum content and programme design;
d. instructional aims and objectives;
e. resource preferences and availability;
f. the instructional methodology; and
g. the mode of evaluation and appraisal.

Whether or not the use of the case method can be justified would depend on the resolution of issues pertaining to (a) to (g). This in turn depends on the perspective on education, training and curriculum development adopted by the given educational institution, and its specific departments of academic learning and/or professional preparation.

Schwab (1973, pp 501-522 advanced the view that the choice of curriculum practices in any educational programme is usually influenced by the following factors:

a. the characteristics of the wider societal environment and specific educational milieu;
b. the nature of the discipline;
c. the characteristics of the learners; and
d. the value orientations of the teaching personnel.

In respect of (a) to (d) two central issues are often raised when trying to justify the use of the case method as an appropriate instructional device. What is the nature and purpose of educational administration and who benefits from educational administration programmes within a particular educational environment?

Hoy and Miskel (1982, p. 27) have noted that a basic problem in educational administration is that it is a relatively new field of academic endeavour and professional preparation. In fact, it is only in the twentieth-century that it has received the status of a separate discipline and a systematic field of study. It is in effect, an applied discipline dependent for its perspectives, concepts and theory on the other social sciences such as sociology, psychology, economics and political science. In supporting the view that educational administration is best viewed in professional terms as an applied discipline Hills (1978, p. 2) notes:

> **In the sharpest possible contrast to the purely academic professions, the paramount feature of applied professions is the primacy of their orientation to a clinical focus. In addition to acting as custodians of specialized bodies of knowledge, the applied professions also act as trustees of categories of practical interests, and needs of society and its members (for example, maintenance of health, the settlement of legal disputes, the effective organization of educational process).**

The practical problems listed above have emerged in the field of medicine, law and now education. The case as an authentic account of a significant organizational event can effectively highlight the problematic issues; and the "disciplined knowledge" from the social sciences can then be used to provide meaningful understanding and explanations. Note that the explanatory power of practical experience should not be down-played.

While there has evolved a fairly widespread consensus on the nature of educational administration as an applied discipline, there are academicians in the field who warn against an over-emphasis on the practical at the expense of much needed theory building and academic research as valid pursuits per se. Hills (1978, p. 3) again seeks to allay this fear when he stresses that academic pursuits are in themselves legitimate, yet given the nature of educational administration as an applied discipline, the instrumental use of academic knowledge takes pre-eminenence:

> **While no less concerned with the maintenance, transmission and extension of knowledge than are the academic professions, the applied professions also assume responsibility for managing on-going practical processes and for seeking and implementing solutions to concrete, practical problems. Their ultimate focus is not the pursuit of knowledge itself, but the effective attainment of practical goals where serious interests of clients are often at stake.**

It has become evident that, how curriculum developers and instructional leaders within the university setting or agency-based training institutions organize programmes of learning in educational administration is largely influenced by their dominant conception of the nature of the discipline. A related concern is the role of the university in the society, and this institution is a major arena for the training of top educational administrators. Lower level administrators, for example, school principals, generally receive on-going training at in-house agency training venues.

In the face of modernization, and the competing constituencies of interest, the modern university has been evolving into a "multiversity." It must equally serve the interests of:

1. the academics who are an integral part of the system;
2. the students for whose schooling and education it is responsible;
3. the businessmen and government agencies who employ the graduates;
4. the politicians who gauge public sentiment about educational issues and proceed to fund as well as develop policies; and
5. the general public who ultimately foot the bill through the payment of taxes.

(Williams, 1981 p. 284)

The goals of the "multiversity" are identified in terms of two pervading concepts of the modern university. Wallerstein (1969) and Harvey and Lennard (1973) refer to the idea of the "idea" as opposed to the "ideal" of the university. The "idea" of the university points to its "popular" functions. These are geared towards public accountability in terms of the provision of useful knowledge and service to the rest of the society for purpose of nation building. University education in this context is seen as a socio-economic investment. It benefits the society in so far as it is a source of ideas for macro-economic and political policy-making and implementation.

Additionally, it is perceived as a centre of human resource development. In respect of its consumptive function, graduates use university credentials to improve their life chances and gain upward social mobility. The university in this respect is usually considered to perform a technical efficiency and consumption function as a "service station."

The multiversity, in performing its "popular" functions, is still expected to retain as its "ideal" the ivory tower activities of teaching and research. The ultimate objective here is the generation and transmission of knowledge, abilities and values which characterise civilization.

A major challenge that faces the curriculum programme developer and instructional leaders is that of designing programmes and methodologies which simultaneously meet the dominant needs of the various constituencies of interest. In sum, these needs are:

a. individual and collective intellectual development;
b. a better understanding of man and his relation to the universe;
c. improvement of society via institution building; and
d. personal and group enhancement.

The monumental task, therefore, is that of creating and maintaining a humanistic and effectively functioning industrial society, while at the same time advancing the intellectual/academic understanding of human society.

It is in response to this "multiversity" orientation that Eisner and Vallance (1974) pointed to the varying and often conflicting conception of the curriculum at all levels of the education system. To the traditionalists, university programmes and teaching methodologies must observe the ends of academic rationalism and information processing for purposes of knowledge generation and transmission.

To the "practitioner oriented," university academics programmes of learning must be socially relevant and geared ultimately toward the social reconstruction of the society. Additionally, they must provide the experiences for the self-actualization of students in so far as personality systems are formed on the basis of humanistic values. Harvey (1979, p. 5) noted that other curriculum theorists have substantiated the view that programme developers are indeed faced with conflictual views of what educational institutions should be doing. (See Appendix I).

The "practitioner oriented" approach to developing teaching methodologies in educational administration is consistent with the nature of the discipline as an applied profession. Consequently, in view of the nature of the discipline and the predominant environmental demands on trained educational administrators to demonstrate effective problem posing and problem-solving skills/competencies, the case as a study, with its related teaching and learning activities, can be used as a viable instrument of instruction. This has led to an ever-increasing questioning of the utility of the traditional lecture method in teaching the applied professions.

The Case Method and the Student of Educational Administration

In principle, the case method is essentially a participatory mode of teaching and learning. Its usefulness has been legitimated so far by consideration related to:

a. the nature of educational administration as a discipline;
b. the predominant demands of the society for educational change; and
c. the curriculum philosophy of course instructors particularly within the university setting.

This methodology can be further defended on the ground that it is an enlightened approach to instruction, given the characteristics of the students as adult learners. It is important to note that training in educational administration is essentially a process of adult education. In this regard, the characteristics of the learners must be duly considered.

Overstreet (1949, p. 43) identified some of the attributes of the successful adult learner. These include autonomy; rationalism; objectivity; deep concerns; tolerance for ambiguity; originality; a problem-solving orientation and integrated self-identity. Knowles (1977, p. 24) urges that in the face of these attributes of the learner, the mission of the adult educator (and the instructional leader in educational administration is certainly one) is to

provide the learning environment in which the students can realize their intellectual and academic potentials. The graduate can then be in a position to respond meaningfully to the imperatives of educational change within the educational system. The rest of this presentation will focus on the mechanics of the case method as a useful methodology for realising the societal, institutional and personal goals in educational administration. How this approach can be employed at the university as a setting for formal education may be compared with its use in agency based training institutions as venues for non-formal continuing education.

Teaching With the Case Method: Some Practical Concerns

a. Curriculum Intent

Notwithstanding the fact that the case method embraces a varied set of pedagogic practices, the case remains the central teaching tool in this methodology. Frantzve (1983, p. 4) is supportive of the view advanced in this presentation that cases used in pre-service university courses allow students to experience vicariously a variety of managerial/administrative situations before the actual plunge in to the "trenches" of routine organizational life. In the in-service programmes run by agency based training institutions, the use of cases may allow for reflexive thinking on existing practice. The analysis of situations reported in cases provides the learner with the opportunity to engage in:

a. decision-making under time pressure;
b. an assessment of fragmented information with the ultimate obligation to react responsibly in the problematic situation under review;
c. risk taking;
d. uncertainty; and
e. decision-making for remedial action after some performance appraisal.

The use of cases allows the student to apply concepts, theories and techniques to resolve different types of organizational problems which have actually occurred.

In contrast, there is a relative degree of passivity which characterises the relationship between teacher and learner when the traditional lecture method is used. The range of intellectual processing from knowledge and understanding to analysis, synthesis and evaluation is usually left up to the learner at the tertiary level of education.

The opportunity for the instructor to intervene directly and consistently in monitoring how students gain these intellectual/academic skills becomes somewhat limited. Essentially this activity remains the responsibility of the learner. Additionally, the moment is delayed when the learner engages in reflexive behaviour, that is, matching reflection to theory as the basis of informed practice. This has often led to the complaint that graduates in administration programmes are "too theoretical," and are generally unable to move with certainty toward the resolution of organizational problems both at the levels of policy formulation and on-going implementation.

Dooley and Skinner (1977, pp. 277-289) and Frantzve (1983, p. 5.) advance the view that the case as a teaching tool helps the student to learn on several levels.

a. Individual analysis through case analysis reports will force the application of theories and techniques of problem-solving.
b. Class discussions help the student to hear and respond to other points of view.
c. A presentation and defence of one's own analysis assist in developing an indepth probing of the case. Hence, synthesis and evaluative skills are required.

The distinguishing characteristic of this participatory approach to teaching and learning is the extent to which the analytical sifting of pros and cons and arriving at a definite decision (however incomplete the information provided) is taken by the student (McNair 1954, p. viii). One of the central objectives of this type of classroom methodology is to help students to value the importance of the transfer of learning from the academic setting to the arena of the task and wide organizational environment.

b. Components of a Case: A Focus on the Substantive Content

There are two major dimensions of a case; they are the literary layout as well as the substantive content of the situation under review. The latter is organized around:

1. the core and/or related problems which may be essentially structural or behavioural in nature; and
2. the contextual/background information in which the problems are embedded.

The substantive content of the case is determined by the educational aims and specific group of learners. For example, University based programmes in educational administration usually cater for the development of middle range and strategic managers at all levels of the formal education sytem. Graduates from these programmes are expected to assume managerial and administrative positions. In view of this, the typical kinds of issues to be dealt with in the various courses become the core content of the respective teaching plans. Fayol (1939) identified some of the issues as the following:

TABLE I.

Fayol's Concept of the Essential Activities in an Enterprise

TO MANAGE

1	2	3	4	5
TECHNICAL ACTIVITIES	COMMERCIAL ACTIVITIES	FINANCIAL ACTIVITIES	SECURITY ACTIVITIES	ACCOUNTING ACTIVITIES

5
MANAGEMENT ACTIVITIES

To Plan
To Organize
To Command
To Coordinate
To Control

Source: From Martin I. Gannon, Management: An Integrated Framework (2nd ed. (1982, p.19)

The two major tasks of managing the organization are the enterprise activities--technical, financial, accounting, commercial and security; and the managerial which focusses the securing of material resources; the creation of an organizational design and the acquiring and utilization of a human resource capability. These are for realizing the enterprise objectives, while at the same time meeting the human needs of people who directly or indirectly form part of the organization.

Case analyses of organizational behaviour at the various administrative levels of the education system would centre, therefore, on the typical managerial decisions to be covered in a management theory course. These are contexted by the particular conceptual framework (classical, neo-classical, systems perspectives) and the related research data to which the instructor is partial. Some of the likely questions raised are:

i. What is the organizational mission given the functions of education in the society, or for the given clientele?
ii. What is the role set adopted by the strategic, co-ordinative and operative managers?
iii. What is the dominant management philosophy?
iv. What are the formalized and emergent lines of authority, communication patterns and the bases of power?
v. What are the leadership style and decision-making patterns?
vi. What is the rationale for job descriptions and job specification of workers?
vii. What is the strategic policy on motivation, organizational control and accountability?
viii. How are resources acquired and utilized?
ix. How does the organization interface with its various publics?
x. What are the policy responses to organizational contingencies? and,
xi. What are the strategic and operative measures for facilitating organizational development and change?

Cases are developed around the issues raised in (i) and (x) and the terminal objectives for the course in management theory include the need to:

1. identify and explain the main management tasks faced by the leadership of large and small scale educational institutions.

2. determine the contribution of theory and research in the area of organizational behaviour to the resolution of given management problems.

3. adopt the position of decision-maker and/or problem solver in a variety of situations involving management problems.

(See Appendix II for the key management theory [Organizational Behaviour] issues)

ii. Literary Layout: The Case Plan

Leenders and Erskine (1978, p. 42) in alluding to the problems of layout of the case raised the following questions: What information should a case contain? How much information should be included? What should be excluded? and Where should the case end? Perhaps a generalized response to these questions is that it depends on the theoretical focus and the practical purpose of the case as a teaching tool. For example, there is need to effect a meaningful balance between the core and contextual information in the case. A major criterion for so doing is the decision-making responsibility that the student is expected to assume: decision-making under time pressure in a situation of fragmented information; risk taking and uncertainty or remedial action after the problematic event. In addition, there is need to consider the theoretical issues to be raised.

In respect of the pertinent concepts, theory and data to be used in the case analysis, Leenders and Erskine (1978, pp. 127-130) refer to the efforts of Professor Frank Folls from the Harvard School to resolve the academic issue of the kind of analytical task(s) that the student is expected to undertake when doing a case analysis. The emergent issue here as seen by these researchers is the level of conceptual difficulty that characterises the case. Three dimensions of difficulty have been identified. There are:

a. the analytical dimension--this involves either evaluating the match between the problem and the given solution, requesting a viable solution to a given problem of asking the student to identify both the problem and solution to a described situation;

b. the conceptual dimension--this requires the student to discern the complexity of concepts and/or theories which can illuminate and explain the analytical issues in the case; and

c. the presentation dimension--this is the contextual realm of (a) and (b) in so far as the case writer makes a decision on the type and scope of background information in which the case problems are embedded. This includes organizational history, personal biographies, environmental forces and current operational data.

In respect of (a) a case outline is structured to include opening paragraphs which usually have either a direct or oblique reference to the conceptual/analytical problem or issue. Some effort is also made to highlight information related to the identity of the decision-maker and the frame of the case. Is it, for example, written at the time when the problem has not yet been identified; at the stage of critical investigation; the decision/implementation phase; the evaluation phase or at a time when the problem has already been resolved? (University of Western Ontario Case Writing Workshop, April 1985). Additionally, the environmental context in which the case event is taking place must be described. The flash back technique may be used to present this type of data.

The body of the case is usually an elaboration of the data provided in the opening paragraphs. Depending on the nature of the analytical task and the degree of conceptual difficulties, enough information must be provided to allow for a meaningful decision to be made. It is to be noted that three criteria for determining how adequate the data are:

a. the type of decision to be made and the circumstances thereto;

b. the time frame involved; and

c. the pertinence of the facts and figures, biographical data, opinions, and the environmental profiles.

C. Case Analysis: Some Instructional Hints

During the conduct of a case analysis, instructors can improve their competence as classroom facilitators if the basic operational principles of case writing are known. For example, awareness of the case dimensions, the rationale for gathering information in the field, and the criteria for determining information adequacy can help tremendously in the actual analysis and decision-making phase. In this presentation hints on how to teach through case work is done through the use of a prepared case. (See Appendix 111).

i. Case Example

Analytically, the case requires the students to explain why the leadership/supervisory style of John Duff is ineffective. Additionally, they are to outline possible ways in which the interpersonal conflict in the Department can be meaningfully resolved. A major emphasis would be on Duff's role in the problem-solving process. Decision-making in this case would be done in a situation where corrective action is needed after a period of ineffectual problem-solving.

The level of conceptual difficulty in the case is relatively low. For example, the core theoretical issue deals simply with styles of supervision. The interrelated concepts include organizational development and change; personality systems--abilities and motives; conflict in organizations and communication. The table below ranks the theoretical concepts which will help to throw light on the core problem identified. The use of such a matrix can help the instructor to remain focussed on the predetermined key issues in the case. Nonetheless, student inputs may and should change both the listing and rank order of concepts if this becomes desirable. The point is, however, that the instructor must have a teaching plan in order to facilitate a productive case analysis session.

TABLE 2

The Different Supervisor - Theoretical Concepts

	1. Organizational Goals	2. Management Philosophy	3. Learning & Memory	4. Personality	5. Motivation	6. Perception	7. Attitudes	8. Performance	9. Stress	10. Communication	11. Decision Making	12. Coordination & Conflict	13. Influence & Power	14. Leadership/Supervision	15. Structure & QWL	16. Organizational Development
1					x									x		
2							x					x				x
3				x												
4						x										
5.																
6									x	x						
7																
8																
9																

Source: Adapted from Robert A. Baron, Behaviour in Organizations: Understanding and Managing the Human Side of Work. Boston: Allyn and Bacon 1983.

ii. The Teaching Notes

The teaching notes which follow the synopsis of the case are intended to serve as a guide for the instructor in order to:

a. ensure clarification of the problematic issues in the case, either in terms of the problem posing questions to be asked, and/or the solution to be given to the presented problem;

b. decide on the conditions under which decision-making for problem resolution should take place; and

c. determine the relevant concepts, theories and research data applicable to the case.

Immediate Issues

1. How prepared was John Duff when he assumed the administrative position as Co-ordinator of the Public Relations Unit?

2. In what specific ways did he contribute to the breakdown in inter-personal relations between his two Administrative Assistants?

3. Why was he disturbed over the possible outcome of his ultimatum to the two officers?

Theoretical Focus

Career path analysis must take account of the "task related maturities" that specialists in the technical stream must develop when promoted to generalist administrative positions in largescale organizations.

Basic Issue

In respect of human resource management and development, what factors should be taken into consideration when assigning senior professionals, who are technical experts, to key managerial and administrative positions?

Teaching Objectives and Possible Use of the Case

This case is intended to have students examine the different types of leadership and supervisory styles in service-type organizations. More specifically, the focus will be on the issues related to task related maturity (TRM). For example, how prepared are senior professionals in training institutions, who may have spent a life time working in teaching and research, to assume managerial and administrative responsibilities in such organizations?

The case can be used to highlight the need for changes in professional requirements when career paths are changed intra-organizationally.

Suggested Student Assignment (after Case Analysis)

Provide a detailed report on the success of a preliminary counselling session which Mr. Duff had requested with the Director of Employee Relations in the aftermath of the "debacle" in his newly established unit.

Reference Readings

Hoy, Wayne, K. and Miskel, Cecil G. Educational Administration: Theory, Research and Practice. N.Y.: Random House, 1982. (Read the Section on Leadership Models from Training Programmes, pp. 250-259)

Lipham, James, "Leadership and Administration" in Behavioural Science and Educational Administration edited by Daniel E. Griffiths. Chicago: University of Chicago Press, 1964. p. 122.

Brown, Alan F. "Reactions to Leadership". Educational Administration Quarterly 3 (1967). pp. 62-73.

Possible Questions for Class Discussion

The Coordinator as Administrator

* How long has the Unit Head been associated with the organization and in what functional capacity?

* What were the essentials of his job descriptions/specifications?

* On the assumption of the role of Unit, how may one describe his management/administrative stature?

* Describe his personality characteristics.

* How prepared was he for the job? (TRM):

  - what were his personal expectations?

  - what were those of the organization?

  - what were those of the Administrative Assistants?

* How can his leadership/supervisory style be described? For example, what was his strategic approach to conflict management?

* What was his attitude to organizational and staff development?

* What was the supervisory response of the Unit Head to the outbreak of conflict? Why?

* To what extent did he seek help from the Employee Assistance Division? What kind of co-operation took place? Was it successful?

* Why did the conflict come to a head?

  - predisposing factors

  - immediate factors?

* What was the co-ordinator's response?

  - implications--legal, industrial, administrative?

The Administrative Assistants

* What was the professional, academic and socio-cultural background of the two Administrative Assistants?

* What were their perceptions of the terms and conditions of employment?

* What accounted for the deteriorating interpersonal relationship?

  - personality

  - organizational

  - cultural

* What intensified the conflict?

The Organization

* What type of organization was it? And in what kind of communal/societal environment did it exist at that given historical point in time?

* What was its a) Size? b) Functional divisions? c) Goals and objectives? and d) Status (in respect of efficiency and effectiveness?

* When was the Public Relations Unit established? What purpose was it intended to serve?

  - How much strategic/co-ordinative planning was undertaken?

  - What was the policy on human resource acquisition, allocation, use and evaluation?
    (Refer to job descriptions, wage and salary, administrative grading)

* What were the Organizational/Departmental policies on:

    a. Recruitment, selection, placement and training?
    b. Employment policy in respect of wage and salary administration
    c. Job Analysis
    d. Performance appraisal.

iii. Some Hints on Organizing the Case Discussion/Analysis

There are three major considerations the instructor must bear in mind when leading a case discussion. Apart from the substantive issues which deal with resolving the core and related problems in the case, there are the procedural (methodology) and the environmental (class set) concerns to which the lecturer must attend.

With respect to actual classroom activities it is desirable to consider three possible phases. These pertain to matters of methodology and physical class set. There are the pre-class activities which include the following:

a. ensuring that case materials are available to the students;

b. preparing a collegial classroom set;

c. putting in place the appropriate classroom technology--overhead projectors; chalkboards and other teaching aids; and,

d. organizing for the proper identification of class participants.

In the classroom phase, the basic analytic process involves, initially, a set induction to the case discussion--for example, a warm-up session of some kind. The actual case analysis requires the students to become very participatory in the classroom interaction. For example, in the case under review, they are expected to:

a. arrive at some broad consensus on the nature of the problem;

b. identify the illuminating concepts and theories;

c. provide relevant case data to substantiate points made;

d. arrive at a workable number of decision criteria to be used for problem-solving;

e. decide on the most appropriate decision alternative;

f. provide both a justification and a plan for implementation;

g. give details on the timing and strategies of implementation; and

h. list and explain the intended and unintended consequences of the implementation effort.

It has become customary to precede the activities of (a) to (h) with a scheduled half to three-quarter hour long student study session. During this time, students are left to themselves to brainstorm about the case. The instructor may or may not visit the groups to get an idea of the thought processes of the students.

The actual case discussion allows for brainstorming, teacher and student probes, summary points and closure activities. Toward the end of the class session the instructor may find it necessary to highlight the key points through a mini-lecture. For example, in commenting on the negative consequences of being a diffident supervisor, the instructor may list and explain the type of competencies required for effective supervision. There are occasions when a case session could usefully be followed up by one or more scheduled lectures to elucidate the "disciplined" knowledge related to the conceptual issues and problematic concerns embedded in the case.

Classroom observation of a well executed case discussion would show a participatory mode of learning and teaching. Dooley and Skinner (1977, p. 287) highlight the educational assumptions and instructional intent of this method in the table below:

TABLE 3

CLASS DESCRIPTORS LOW/HIGH	INSTRUCTOR DESCRIPTORS LOW/HIGH	EDUCATIONAL ASSUMPTIONS
Participation/ involvement	Respect for students	(1) Responsibility for learning
Enthusiasm/mood	Patience	instructor ... class
Freedom to risk ask/fail	Face	(2) Objectives
Fun level	Voice	knowledge ... skill
Preparation level	Physical body movements	
Discussion Pace	Enthusiasm	
	Concern for individuals	(3) Pitch: class level
	Avoidance for superficiality/ analytical	
	Excellence demanded	
	Sense of rigor, importance, demands	

Source: Arch R. Dooley and Wickham Skinner. "Casing Casemethod Methods," April 1977, p. 287

In the post-teaching phase, students are usually given a specific assignment to be turned in as a case report. This report is a written account of the case analysis based on the format used in the case discussion. Students are expected to include in this organizational analysis, a judicious documentation of supportive literature on the thematic issues raised in the case. Differing explanations and recommendations are quite acceptable as long as reasoned support is provided. One of the biggest problems with many reports is the inadequate use of relevant case data as the basis of substantiation. Also, there is the tendency to accept operational data (charts, graphs and quantitative information) at face value. It is important to assess the consistency of the various types of data provided.

Teacher evaluation of case reports should take account of the student's ability to engage in problem posing; problem-solving; and, more importantly, the internal consistency of the arguments presented. This must be backed up by theory-based justification of decision choices made. The clinical use of case data is an integral part of the exercise.

CONCLUSION

Case Teaching: A Note of Caution

It has been argued in this presentation that there is a continuing demand for social relevance in developing programmes of instruction in applied disciplines such as educational administration. Consequently, educational "praxis" has become an intended learning outcome on the part of the student. The case method is suggested as a useful approach to helping the student become a self-directed learner. It allows him/her to acquire the skills of reflexive thinking in under-graduate and postgraduate programmes in educational administration. It must be noted that the "practitioner oriented" approach to such programmes should not necessarily preclude efforts at pure research and knowledge transmission per se. It is really a matter of emphasis.

It is absolutely necessary to point out, however briefly, some of the limitations of the case method. Firstly, course instructors must be extremely competent in understanding the mechanics of case writing and teaching. If not, there is usually much superficial learning taking place. For example, Argyris (1980, p. 211) highlighted the philosophical and pedagogical problems that could develop when using the case method. He pointed to the likelihood that case teaching in management development programmes may

> (1) facilitate learning that does not question the underlying values of executives or the policies of their organization and (2) inhibit the learning that would enable the executives to question these basic factors and to improve the application of new learning in the home organization.

Such learning is described as "double-looped," for while it may result in the detection and correction of errors in the operational phases of policy implementation, it does not agenda the need for changing underlying philosophical perspectives, as well as executive assumptions, policies and goals.

There can be little doubt as to the validity of Argyris's concern. Getzels (1979, p.5), in his discussion on problem-finding and research in educational administration, argued that "the function of thinking is not just solving an actual problem but discovering, envisaging, going into deeper questions." Authentic case teaching is informed by Albert Einstein's statement that

> **the formulation of a problem is often more essential than its solution, which may be merely a matter of mathematical or experimental skill. To raise new questions, from a new angle, requires creative imagination and marks read in advance in science.**
>
> **(Getzels, 1979, p.5)**

The admonition here for the case writer and teacher is the need to take up the challenge of problem definition in the case analysis so that it is undergirded by philosophical, sociological and practical meaningfulness. Does the critical incident under review, for example, point in the direction of systematic organizational development and change? Does the issue of poor supervision reflect the wider concern of valuing on the importance of administrative and human relations within the corporate culture of the organization? In sum, what is being suggested is a holistic approach to resolving the issues within the narrow confines of the critical incident.

Secondly, the often atheoretical approach to the case analysis and report is often said to be the reason for superficial teaching and learning. The principle of educational "praxis" is a must when using this method. Thirdly, case exercises can be very time consuming and require effective teaching resources. Also when compared with lectures, they seem inefficient in the area of information processing, for students must have the prerequisite skills of handling relatively large volumes of information. For example, an ever present danger is the tendency to synopsize the data in the case, without ultimately discerning the block managerial/administrative issue(s) to be resolved. Providing theoretical and empirical justifications for judgements made is yet another kind of difficulty. This can be exacerbated by the use of emotion for logic. The reduction of these kinds of problems in area of intellectual/academic processing during the case analysis and report depends in large measure on the facilitating skills and value orientations of the lecturer.

Fourthly, effective testing and appraisal of students' efforts during the case discussion and report have remained areas of concern. For example, within the university setting, instructors are questioned on the validity of awarding students marks for classroom participation. There is usually fear of too much subjectivity. The key issue here is that it is often unproductive to talk about right and wrong answers. A better guide here is to decide on whether the right questions have been asked and the solutions offered reasonably justified.

In view of the difficulties, it may be judicious to downplay the use of cases for beginners in educational administration programmes. Ensure that a body of concepts, theories and research data have first been acquired by the students. Later on, perhaps at the postgraduate stage, the method can be more defensibly employed.

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A P P E N D I C E S

Appendix 1.

Locating Varying Conceptions of Curriculum in Tyler's Sources and in Academic Disciplines

Tyler (1949)	Joyce and Weil (1972)	Eisner and Vallance (1974)	McNeil (1977)	Academic Discipline Source (Zais, 1976)
	1. Personal Sources	Self Actualization	Humanistic Curriculum	Third Force Psychology Existential Person-centred philosophies
The Learner	2. Behaviour Modification	Technology	Technology	Behavioural Psychology
	3.a. Information Processing	Cognitive processes		Developmental Psychology
The Subject Matter	3.b.	Academic Rationalism	Academic Subject	Other World Platonic Philosophy
Contemporary	4. Social Interaction	Social Reconstruction/ Relevance	Social Reconstructionists	Earth centred philosophies. Disciplines that deal with social organization with its effect on individuals and how they in turn affect social change--sociology, social psychology, history, economics

Source: Claudia Harvey. "Conceptions of Curriculum and Their Application to Teacher Education Programmes". Unpublished M.A. Thesis OISE, 1979 p.

Appendix 11

Key Issues in Organizational Behaviour in the Educational Setting

Alienation
Career Development
Centralization/Decentralization
Collective Bargaining
Communication
Conflict Resolution
Contingency Planning
Crisis Management
Employee Relations
Group Behaviour
Goal Setting
Interpersonal Relations
Job Satisfaction
Job Enrichment
Leadership
Management Philosophy
Management of Change
Matrix Organization
Motivation
Morale
Organizational Change
Organizational Structure
Personal Development
Reorganization/Restructuring
Supervision
Strategic Planning

Appendix 111

THE DIFFIDENT SUPERVISOR

In 1985, one year after John Duff became the Coordinator, Public Relations at a large training institution in Toronto, he sat considering the outcome of his recent decision to have his two Administrative Assistants dismissed if they did not immediately resolve their personality differences. His response was somewhat unexpected for he had previously chosen to ignore the deteriorating interpersonal relations between the two people. Now, he had acted out of embarrassment and hurt for the officers had failed to cooperate even minimally in making the Department's highly publicized community outreach project the success that was anticipated.

Duff, a genial and hardworking person, was appointed in 1984 to head the newly established public relations unit after some thirty years as an instructor/consultant in the Training Division of the organization. Much of his effort in the new position had been spent in meetings with the top administrators of the institution formulating plans for the large scale community outreach project. Additionally, he was frequently out of the office meeting clients, public officials and the leaders of voluntary associations.

The two senior Administrative Assistants assigned to the Unit were respectively responsible for general office management and community outreach. From time to time they were expected to collaborate in order to get the various Project tasks completed. They had been recommended for the positions in the light of their years of service in several of the Departments in the organization (forty years altogether) and their acknowledged capability and competence in office administration.

Initially, the Assistant responsible for office management was one salary grade below her colleague and had to report to her. After some months, as part of the Financial Controller's efforts at incorporating the Unit into the wider organizational wage structure, both positions were given equivalent status and remuneration. Also, both officers were to report directly to the Coordinator.

It soon became evident that the two officers, who had come from different cultural and ethnic backgrounds, had developed personal antagonisms for each other to the point where there was a virtual breakdown in communication. At one stage, there was a request for a screen to separate their areas of operation in the office.

As the tension increased in the office, the Coordinator would from time to time intervene diplomatically, and then only to offer a word of counsel and suggest the need for conciliation. Since the work output remained relatively high, he generally ignored the fact that the situation was becoming explosive. At one point, he confided to an Employee Relations Officer in the Personnel Department that the responsibility for working out their differences lay with the women themselves. Laughingly he said, "Let those dames sort themselves out. What am I doing in the middle of their brouhaha? I'll be damned." Privately he lamented that the Personnel people were not doing their job.

Events came to a head while the Coordinator was away on business related to the mounting of the Unit's first major Community Outreach Project. The two Assistants were expected to work together to provide the support services for the event. In attempting to do so they got into a vicious confrontation which, in the absence of the Coordinator, had to be resolved by the Director of Employee Relations himself. As a result of this altercation the objectives of the Project were only partially achieved and the Unit received a poor evaluation from the various community agencies.

In a state of intense pique, Duff issued his ultimatum. As he calmed down and awaited a response, he became increasingly worried about his general administration of the Unit, and in particular how he could get the best out of his workers.

This case was written by Gwendoline Williams during the 1985 Case Writing Workshop. Case material of the School of Business Administration is prepared as a basis for classroom discussion.
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